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IMCA is now the Investments & Wealth Institute

The Investment Management Consultants Association (IMCA) is now the Investments & Wealth Institute (Institute).

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BlueModus



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The Institute's new site saw a significant increase in site traffic, a more exciting and flexible brand experience, as well as a significant cost savings by consolidating all its marketing and automation efforts to a single Kentico EMS platform.

Page views increase by

59%

Background

The Investments & Wealth Institute is a professional association that delivers rigorous, highly practical education, through events, continuing education courses, and acclaimed certifications. As an advanced education provider and standards body for financial advisors, investment consultants, and wealth managers who embrace excellence and ethics, their existing CMS had a lot of issues that needed resolution.

Goals

The customer's goals for the new site included:

- A more exciting and flexible brand, on a mobile-friendly site
- A more easily manageable system, with the ability to have a distributed workflow and more content contributors and editors
- A cost savings by consolidating all marketing and automation efforts to a single EMS platform
- A better, more stable integration with **Abila netFORUM**

Challenges

The Institute's previous site contained a lot of legacy content that was poorly organized. They had been using HubSpot and BlueHornet for their CRM and marketing needs, which was becoming cost-prohibitive. They needed a platform that would allow management of e-marketing and automation efforts in one place. Also, to improve efficiency, they also needed a more user-friendly CMS, capable of decentralizing the production and editing of the site from a single department, in order to give ownership of relevant sections of the site to each department.

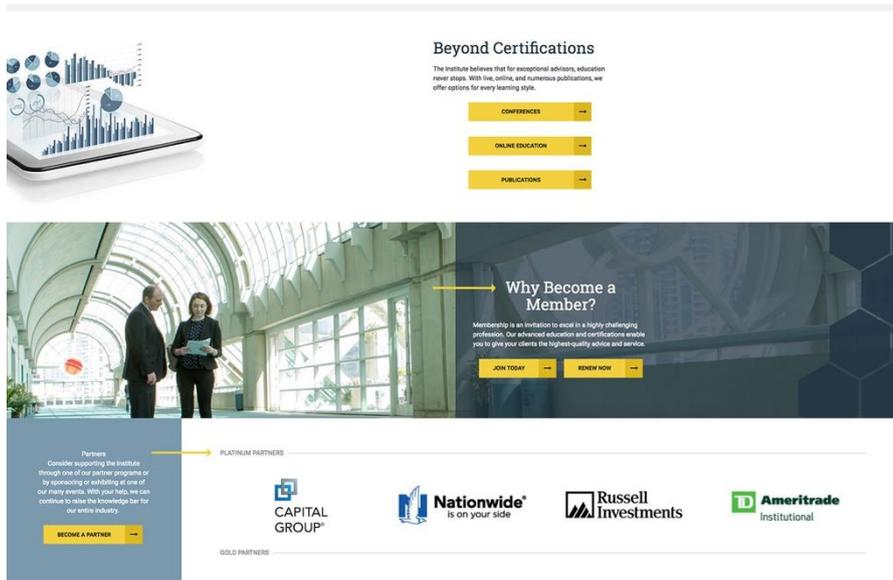
Solution

In a migration from Drupal to Kentico 10 EMS, the redesigned site launched in November 2017, after approximately three and a half months of development. The new site took advantage of nearly every Kentico feature available, including **Web Farm, Events, Workflows, Roles, User Types, EMS, Email Marketing, Marketing Automation, Campaigns, Landing Pages, Integration BUS, rest APIs** and numerous **Content Types**.

The site was integrated with Abila netFORUM, Abila single sign-on, **SendGrid**, and a **payment processing platform**. Kentico's API and integration features allowed for a seamless process for users to easily manage their membership, as well as sign in and make purchases. Membership, transactional, purchase, and other CRM data drive segmentation, single-sign-on, and e-commerce capabilities throughout the site.

The marketing capabilities available within Kentico EMS allowed the Institute to consolidate their e-marketing and automation efforts into a single platform, fully replacing two different systems (BlueHornet and HubSpot).

The organization uses Kentico **Email Marketing** features to provide comprehensive emails for loyalty, prospecting, and other marketing emails. They make use of sophisticated **Marketing Automation** and highly segmented lists to drive email campaigns. Emails are all personalized, with a high volume of messages (between 250,000 to 750,000 emails per month) being deployed.



The Institute has also taken advantage of the EMS **Marketing Campaigns** feature to consolidate various disconnected marketing campaigns, in order to increase delivery, efficiency, and maintain consistent brand standards, and will continue to optimize these marketing efforts in the future.

Personalization on the home page is used, based on known information from logged-in visitors, or inferred information based on lead source or behavior, to provide unique messaging for everything from individual certification programs and prospecting, to promoting upcoming events of interest to that particular user.

The Institute site has future plans to institute additional scoring and personalization to this site through **A/B and MVT testing**, so while these testing features are not yet being used, the customer will soon be taking advantage of all features that the online marketing suite has to offer.

The customer also has plans for even deeper integration with their AMS system (which essentially serves as both their CRM and ERP) as well as to add additional complex marketing automation workflows.



Results

The Institute's new site, in addition to receiving rave reviews from customers and staff alike, saw a significant increase in month-to-month site traffic when launched: There was a 59% increase in page views, a 48% increase in pages per session, a 17% increase in session duration, 10% decrease in bounce rate, and 10% more overall traffic.

Key Criteria for Choosing Kentico

- BlueModus had achieved previous success in implementing Kentico to integrate with netFORUM for other association websites, and their team determined that this would be the best solution for the Institute as well.
- The Institute's e-marketing and automation requirements for the site were an excellent match with the capabilities of Kentico EMS. As a result, BlueModus recommended the Kentico solution.

BlueModus

The #1 Kentico Gold Partner in the world, BlueModus® is a full-service technology agency with offices across the US and Canada. We serve marketers of all types. Whether you're with a digital or traditional agency, a global company, or a service provider, you can count on us to deliver the technical expertise you need to build digital brands.

EXPERTISE

Come to us for all types of Kentico projects. We've earned the credentials of Kentico Quality Expert (the first in North America), Development and Integration, Intranet, E-commerce, Microsoft Azure, and Online Marketing.

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Rely on our certified developers to get any project done—no matter how straightforward or complex. Since 2005, we've built hundreds of websites on Kentico, including projects for 12 Fortune 500 companies and leading agencies like Edelman and Organic.

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Get a solution that does exactly what you want. Our marketing technologists specialize in customizing, extending, and integrating Kentico with other services. No challenge is too big.

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Take advantage of end-to-end technical services, from strategy and design to development and infrastructure, and even ongoing support. We'll help you plan, implement, and manage custom platforms to power any digital presence.

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COMMITMENT

Engage an agency that's in it for the long haul. Whether we build a new solution for you or refresh a site you already have, you can depend on us to help you maintain it across every stage.

PASSION

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